


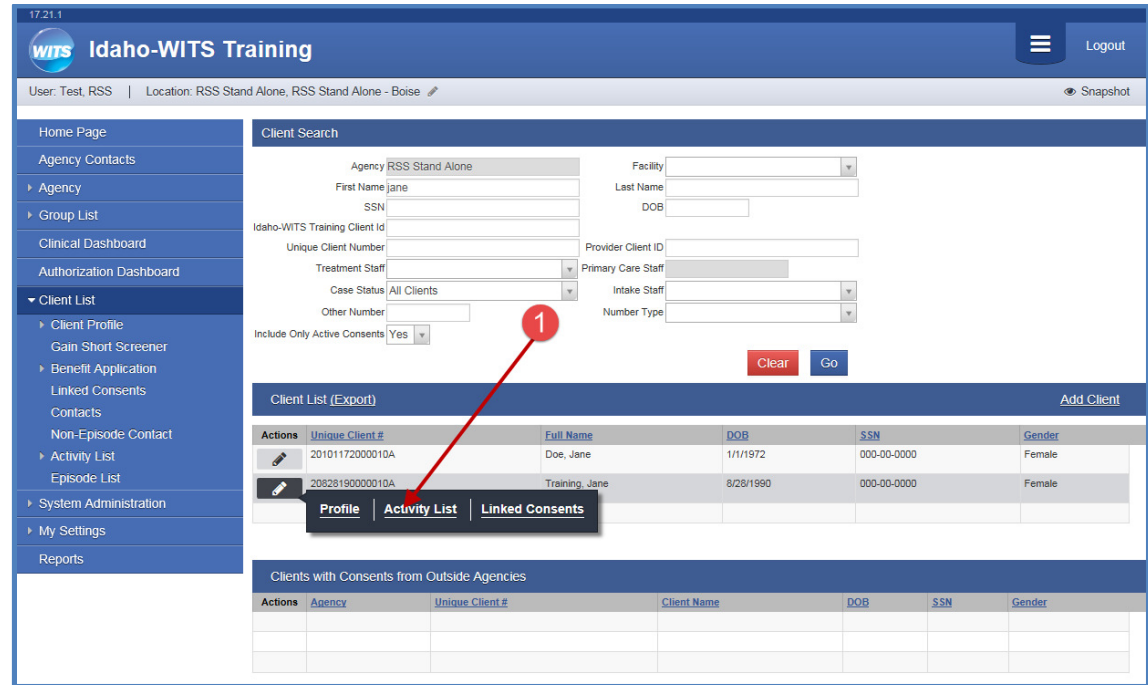
Closing a Client without an Admission Record

Episodes should be closed if the client has not received services in 30 days.

NOTE: IDHW & IDOC often require notification through Authorization Change Requests of a client discharging from your agency. Please go to the WITS Website www.wits.idaho.gov, under WITS User Guides, Authorization Change Requests, to review the overview and processes document that applies to the client's discharge situation.

Close the Program Enrollment

1. **Getting here:** Login, select the **Facility**, select **Client List** on the Navigation Pane (left menu) to generate the Client Search Screen, find client, **hover over the**  **and select Activity List.**



17:21:11
WITS Idaho-WITS Training
User: Test, RSS | Location: RSS Stand Alone, RSS Stand Alone - Boise | Snapshot

Home Page
Agency Contacts
Agency
Group List
Clinical Dashboard
Authorization Dashboard
Client List
Client Profile
Gain Short Screener
Benefit Application
Linked Consents
Contacts
Non-Episode Contact
Activity List
Episode List
System Administration
My Settings
Reports

Client Search

Agency: RSS Stand Alone
First Name: Jane
Last Name: Doe
SSN: 000-00-0000
DOB: 1/1/1972
Idaho-WITS Training Client ID: 20101172000010A
Unique Client Number: 20828190000010A
Treatment Staff: [Dropdown]
Case Status: All Clients
Other Number: [Text]
Include Only Active Consents: Yes [Dropdown]
Facility: [Dropdown]
Last Name: Doe
DOB: [Text]
Provider Client ID: [Text]
Primary Care Staff: [Text]
Intake Staff: [Text]
Number Type: [Text]
Clear Go


Client List (Export) Add Client

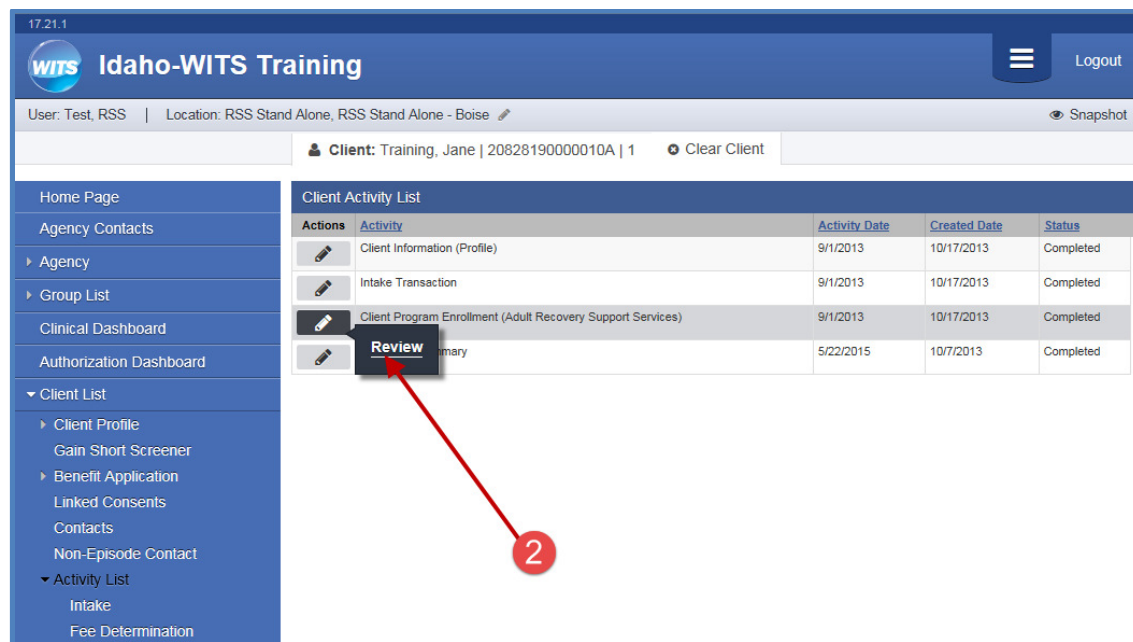
Actions	Unique Client #	Full Name	DOB	SSN	Gender
	20101172000010A	Doe, Jane	1/1/1972	000-00-0000	Female
	20828190000010A	Training, Jane	8/28/1990	000-00-0000	Female

Profile Activity List Linked Consents

Clients with Consents from Outside Agencies

Actions	Agency	Unique Client #	Client Name	DOB	SSN	Gender

2. Hover over the  and click **Review** for the appropriate the Client Program Enrollment. *If there is no Program Enrollment listed, go to page 4 of this document to close the Intake.*



17.21.1

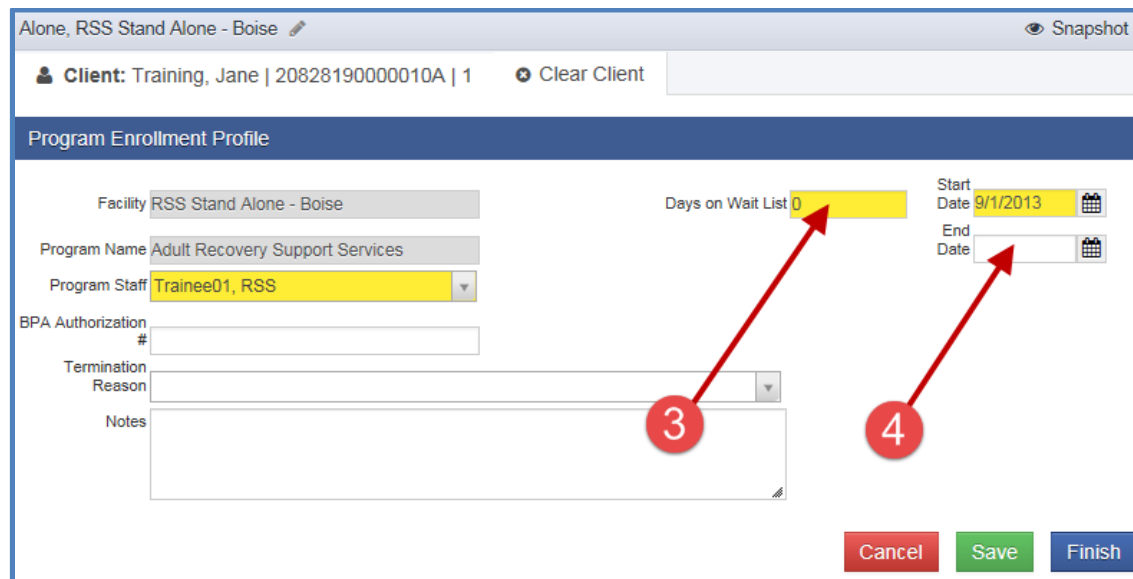
Idaho-WITS Training Logout

User: Test, RSS | Location: RSS Stand Alone, RSS Stand Alone - Boise | Snapshot

Client: Training, Jane | 20828190000010A | 1 Clear Client

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	9/1/2013	10/17/2013	Completed
	Intake Transaction	9/1/2013	10/17/2013	Completed
	Client Program Enrollment (Adult Recovery Support Services)	9/1/2013	10/17/2013	Completed
	Review	5/22/2015	10/7/2013	Completed

3. Enter the **Days on the Wait List** if necessary.
4. Enter the **End Date**. The Termination Reason will become required once the End Date is entered.



Alone, RSS Stand Alone - Boise | Snapshot

Client: Training, Jane | 20828190000010A | 1 Clear Client

Program Enrollment Profile

Facility: RSS Stand Alone - Boise

Program Name: Adult Recovery Support Services

Program Staff: Trainee01, RSS

BPA Authorization #

Termination Reason

Notes

Days on Wait List: 0

Start Date: 9/1/2013

End Date

Cancel Save Finish

5. Select the **Termination Reason**.

6. Click **Save** and **Finish**.

The screenshot shows a web application window titled "Alone, RSS Stand Alone - Boise" with a "Snapshot" icon in the top right. Below the title bar is a client information section: "Client: Training, Jane | 20828190000010A | 1" and a "Clear Client" button. The main section is titled "Program Enrollment Profile". It contains several fields: "Facility" (RSS Stand Alone - Boise), "Days on" (1), "Start Date" (9/1/2013), "Program Name" (Adult Recovery Support Services), "Program Staff" (Trainee01, RSS), "BPA Authorization #" (empty), "Termination Reason" (a dropdown menu highlighted in yellow), and "Notes" (a text area). A red arrow with a circle containing the number "5" points to the "Termination Reason" dropdown. At the bottom right, there are three buttons: "Cancel", "Save", and "Finish". A red arrow with a circle containing the number "6" points to both the "Save" and "Finish" buttons.

Close the Intake

NOTE: Do not close the Intake until all Encounter Notes have been entered and Released To Billing.

1. Select Intake on the Navigation Pane .

The screenshot displays the Idaho-WITS Training web application. The top header includes the WITS logo, the title 'Idaho-WITS Training', a menu icon, and a 'Logout' link. Below the header, a status bar shows 'User: Test, RSS' and 'Location: RSS Stand Alone, RSS Stand Alone - Boise'. A 'Client' section displays 'Client: Training, Jane | 20828190000010A | 1' and a 'Clear Client' button. The main content area is divided into a left navigation pane and a right section titled 'Program Enrollment'. The navigation pane lists various options: Home Page, Agency Contacts, Agency, Group List, Clinical Dashboard, Authorization Dashboard, Client List (expanded), Client Profile, Gain Short Screener, Benefit Application, Linked Consents, Contacts, Non-Episode Contact, Activity List (expanded), Intake (circled in red), and Fee Determination. A red circle with the number '1' is placed over the 'Intake' option, with a red arrow pointing to it. The 'Program Enrollment' section contains a table with columns: Actions, Program Name, Start Date, End Date, Facility, and Notes. The table has one row with the data: 'Adult Recovery Support Services', '9/1/2013', '5/27/2015', 'RSS Stand Alone - Boise', and an empty 'Notes' field. An 'Add Enrollment' link is in the top right of this section, and a 'Finish' button is in the bottom right.

Actions	Program Name	Start Date	End Date	Facility	Notes
	Adult Recovery Support Services	9/1/2013	5/27/2015	RSS Stand Alone - Boise	

2. Enter the **Date Closed**.
3. Click **Save & Close the Case**.

Alone, RSS Stand Alone - Boise Generate Report Snapshot

Client: Training, Jane | 20828190000010A | 1 Clear Client

Intake Case Information

Intake Facility	RSS Stand Alone - Boise	Case #	1
Intake Staff	Buskey, Michelle	Case Status	Open Active
Initial Contact	Other	Date of First Contact	9/1/2013
County of Res.	BONNEVILLE	Intake Date	9/1/2013
Source of Referral	Parole/Reentry Staff	Pregnant	No
Referral Contact		Due Date	
	Add Collateral Contact	Priority Population	IDOC
Is client under court supervision?	No	HIV Tested?	
Supervising County		Past IV Drug Use	Denies
Type of Insurance	Blue Cross/Blue Shield Health Maintenance Organization (HMO) Medicaid Medicare	Presenting Problem (In Client's Own Words)	help
Inter-Agency Service	Adult Protection Court/Legal Interface Developmental Disabilities Domestic Violence Service Provider	Type of Insurance Selected	
Domains	ATR	Inter-Agency Service Selected	None
Date Closed	5/27/15	Selected Domains	Substance Abuse

[Save & Close the Case](#) Cancel Save Finish

Actions

4. The case is closed and the Intake is Read Only. Click **Finish**.

Alone, RSS Stand Alone - Boise Generate Report Snapshot

Client: Training, Jane | 20828190000010A | 1 Clear Client

Intake Case Information

Intake Facility	RSS Stand Alone - Boise	Case #	1
Intake Staff	Buskey, Michelle	Case Status	Closed
Initial Contact	Other	Date of First Contact	9/1/2013
County of Res.	BONNEVILLE	Intake Date	9/1/2013
Source of Referral	Parole/Reentry Staff	Pregnant	No
		Due Date	
Referral Contact		Priority Population	IDOC
		HIV Tested?	
		Past IV Drug Use	Denies
Is client under court supervision?	No	Presenting Problem (In Client's Own Words)	help
Supervising County			

Type of Insurance	Type of Insurance Selected
Blue Cross/Blue Shield	
Health Maintenance Organization (HMO)	
Medicaid	
Medicare	

Inter-Agency Service	Inter-Agency Service Selected
Adult Protection	None
Court/Legal Interface	
Developmental Disabilities	
Domestic Violence Service Provider	

Domains	Selected Domains
ATR	Substance Abuse

Date Closed 5/27/2015

Finish

Actions